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# PURCHASING USER MANUAL

## RECEIVING

### INTRODUCTION

The Receiving **Status** screen displays purchase orders that have been saved in the application and allows you to find purchase orders by several criteria. The receiving personnel are able to:

- Select purchase orders to record the items received.
- Record which items are received.
- Record any back-ordered, missing, broken, or unavailable items.
- Print any receiving documents or reports.

Figure 1 - Receiving Status screen

The screenshot shows the 'Receiving' tab selected. Search filters include PO #, Req #, Status (set to 'All Purchase Orders'), and Request Date Range. A 'Find' button is present. Below the filters is a table with columns: PO #, Required by, Vendor, and Status. The table contains three rows of data, each with a 'Select' link in the first column.

	PO #	Required by	Vendor	Status
Select	PO000012		OFFICE DEPOT INC	All items received
Select	PO000014		IBM	All items ordered
Select	WKP00003		CLOS OFFICE SUPPLY INCORPORATED	Some items received

### TO VIEW THE PURCHASE ORDER STATUS LIST

The list of purchase orders is organized by column headers to show the following information:

- **PO #.** The purchase order number (if the purchase order has been marked as ordered).
- **Required By.** The Required Delivery date (if entered on the purchase order).
- **Vendor.** The vendor name (if one was entered).
- **Status.** The status of the purchase order.

To sort the list, click a column header to sort by. For example, click **Vendor** to sort by the vendor names in alphabetical order.

## TO ENTER RECEIVING INFORMATION

1. On the **Status** screen, click **Select** next to a purchase order.
2. The purchase order items will be displayed on the **Receiving** screen.

Figure 2 - Receiving screen

Rcv	Item Status	Item #	Description	Qty	Unit	Price
<a href="#">Select</a>	Ordered	521-933	paper	1	Box	\$60.00
<a href="#">Select</a>	Ordered	155-6666	pen	8	Box	\$60.00
<a href="#">Select</a>	Ordered	265-899	markers	9	Box	\$10.00
<a href="#">Select</a>	Ordered	151669-3	tape	14	Box	\$50.00
<a href="#">Select</a>	Ordered	165685	staples	5	Box	\$5.00

3. Review the purchase order to compare it to the items received.
  - Review the line item details on the receiving screen for **Item #**, **Description**, quantity (**Qty**), **Unit**, and **Price** (if your agency has enabled prices to be displayed on the **Receiving** screen)
  - Click **Preview** next to a line item if you want to view and/or print the line item details in PDF format.
  - Click **Print Preview RCVG** if you want to view and/or print the purchase order details in PDF format.
4. Check the **Rcv** check box next to each line item received that matches the purchase order and then click **Receive** to mark all items received.
5. If any items received do not match the purchase order, click **Select** next to the line item.
  - a. Enter the receiving information on the **Receive Item** window.

Figure 3 - Items missing

Item Description: HP6609 HP PRINTER

Order Quantity 1 Unit of Measure Each Requested Delivery Date 08/15/2008

Quantity Outstanding 1 Unit Price \$699.99 Actual Receiving Date 09/29/2008

Line Item Notes:

☒ Everything is here  
☐ Something is missing  
☐ Something is broken  
☐ Something is backordered / partial receipt  
☐ Something is not available

Quantity Received 1 Ok

- b. Enter the **Actual Receiving Date** (or click the calendar icon to select a date).
- c. Select a reason why the items received do not match the purchase order – **Something is missing, Something is broken, or Something is**

**backordered/partial receipt, or Something is not available.** (You will be able to select only one. If you receive a shipment that has items broken and items backordered, select **Something is missing** and add **Notes** for explanation.)

- d. Enter the actual **Quantity Received**.
- e. Click the line item **Notes** icon to add explanatory notes, e.g., why items were not received or why items were returned, etc.
- f. Click **OK**.
- g. Click **Done**. The line item will be split on the **Receiving** screen into a line of the received items and a line of the outstanding items. Click the **Description** column header to sort the items alphabetically.

## E-MAIL NOTIFICATIONS

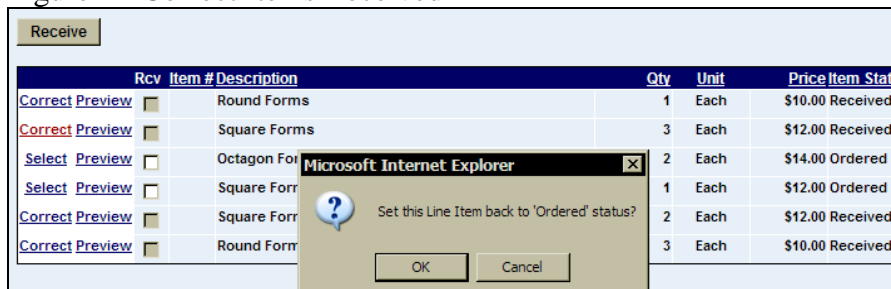
If the agency administrator has enabled e-mail notification, an e-mail will be sent automatically when the receiver marks that something is missing, broken, backordered, or not available.

Action	E-mail recipient
Received/Something Missing	Requester/Purchaser
Broken	Requester/Purchaser
Backordered/Partial	Requester
Received (all)	Requester
Not Available	Requester/Purchaser

## TO UNDO ITEMS MARKED AS RECEIVED

If you accidentally mark items received that were not, click **Correct** next to the item(s), and then click **OK**. Items will revert to status of **Ordered** and you can select them for receiving when they are actually received.

Figure 4 - Correct Items Received



## TO SEARCH FOR PURCHASE ORDERS ON THE STATUS SCREEN

1. The first section of the **Status** screen contains search criteria to find purchase orders. Select from the following:
  - **PO #.** The purchase order number.
  - **Req #.** The requisition number that a requisition item was on. Other items from other requisitions may be on a purchase order.
  - **Status.** The status of the purchase order. Select a status from the drop-down menu. (The status **Active or recently received** is for the last seven days.)
  - **Request Date Range.** The date the purchase order was created. To use this search criterion, select **All Purchase Orders** from the **Status** drop-down menu. Select a pre-defined date range or enter the date range.
2. Click **Find**.
3. To reset the search criteria to default settings, click **Reset** and then click **Find**.